

Enhanced Jefferson
DTS INTEGRATED TRAINING CURRICULUM
DEFENSE TRAVEL ADMINISTRATION CURRICULUM

*Breaks as appropriate

Day 1

0800 – 1000 INTRODUCTION

- Administrative Remarks
- DTS Overview
- Class Registration

1000 – 1100 DTS System Overview

- Training Overview
- DTS System Overview
- Demo/ DTS Routing Process

1100 - 1200 DEFENSE TRAVEL ADMINISTRATION

LESSON 1 – DTA LOGICAL FLOW PROCESS

- Overview
- Discussion of DTA Logical Flow Process by Sections

1200 – 1300 LUNCH

1300 - 1700 DEFENSE TRAVEL ADMINISTRATION – (cont'd)

LESSON 2 – ESTABLISH ORGANIZATIONS/SUB-ORGANIZATIONS

- Identify Hierarchical Organizations and Routing List structure
- Determine Naming Sequence for Organizations
- Create “Main” Organization and Sub-Organizations with Default Routing List
- Practical Exercise 1– Create Hierarchical Organizations

LESSON 3 – NAME ROUTING LISTS FOR SUB ORGANIZATIONS

- Identify Routing List(s) for each Sub-Organization to include Conditional Routing
- Change/Create Name Routing List(s) for Sub-Organizations Practical
- Exercise 2 – Create Routing Lists for Various Organizations

LESSON 4 – NAME GROUPS

- Plan Group Structure
- Create/Name Group(s) in appropriate Sub-Organizations
- Add Group Structure for Global Group Membership
- Practical Exercise 3 – Add/Create Group(s) and Add Group Structure for Global Group Membership

DEFENSE TRAVEL ADMINISTRATION – (cont'd)

LESSON 5 – ESTABLISH PERSONAL INFORMATION

- Review/Create Persons Records
- Manually input/maintain Users
- Assign Organizations, Org Access, Group Access, Permission Level, Default Routing List
- Practical Exercise 4 – Establish Traveler/User Traveler Information

Day 2

0800-1200 DEFENSE TRAVEL ADMINISTRATION – (cont'd)

LESSON 6 – COMPLETE ROUTING LIST

- Discuss Status Codes and Actions, Standard Routing List Requirements, Conditional Routing
- Practical Exercise 5 – Complete Routing Lists

LESSON 7 – MANUAL GROUP MEMBERSHIP MAINTENANCE

- Assign Travelers to each appropriate Group Membership List
- Practical Exercise 6 – Group Maintenance

LESSON 8 – SETUP LINES OF ACCOUNTING

- Add LOAs manually
- Copy LOA to Another Organization
- Fiscal Year Roll Over
- Practical Exercise 7 – Lines of Accounting

1200 - 1300 LUNCH

1300 - 1700 DEFENSE TRAVEL ADMINISTRATION – (cont'd)

LESSON 9 – BUDGETS

- Identify Budget item/LOA structure
- Discuss Wildcard settings
- Establish Budget items
- Practical Exercise 8 – Budgets

1400 – 1430 DTA SETUP CLIENT TOOL - OVERVIEW

1430 – 1500 DTA ADDITIONAL INFORMATION (PMO) / HELPDESK

1500 – 1600 READ ONLY ACCESS (ROA) / MAGIC HELP DESK TRAINING

1600 – 1700 TRAVELER RESPONSIBILITIES

DEFENSE TRAVEL ADMINISTRATION – (cont'd)

Day 3

0800 - 1200 DOCUMENT PROCESSING

LESSON 1 – AUTHORIZATIONS/Order

- Creating a New Authorization/Order
- Reviewing /Updating Traveler Information
- Preparing an Itinerary
- Making Travel Arrangements
- Estimating Expenses
- Accounting
- Additional Options
- Review/Sign

LESSON 2 – GROUP AUTHORIZATIONS

- Creating a Group Authorization / Order
- Group Travel Selection
- Preparing an Itinerary
- Ticketed Transportation
- Estimating Expenses
- Cost Distribution
- Accounting
- Additional Options

LESSON 3 – ADJUSTMENTS/AMENDMENTS

- Adjusting a Document
- Amending a Document

1200 – 1300 LUNCH

1300 – 1600 DOCUMENT PROCESSING (cont'd)

LESSON 4 – CREATE A LOCAL VOUCHER

- Introduction
- Create a Local Voucher
- Expenses
- Accounting Codes (Lines of Accounting)
- Additional Option
- Preview/Sign

LESSON 5 – CREATE A VOUCHER FROM AUTHORIZATION

- Introduction
- Creating a Voucher from Authorization
- Review/Update Itinerary
- Review/Update Expenses
- Add/Update Ticketed Transportation
- Additional Options (Review/Update Lodging/M&IE)
- Review/Sign

DEFENSE TRAVEL ADMINISTRATION – (cont'd)

1600 – 1700 AUTHORIZING OFFICIALS RESPONSIBILITIES

Day 4

0800 – 1000 ROUTE AND REVIEW

LESSON 7 – AUTHORIZING OFFICIALS

- Overview
- Review Document
- Pre-auditing Documents
- Other Authorizations
- Document Details
- Adjustments
- Digital Signature (Approve, Return or Cancel)
- Funds Certification
- Setup/ Delegating and Revoking Signature Authority
- Printing

LESSON 6 – CANCELLATION PROCEDURES

1000- 1130 GENERATE REPORTS

- Document Summary
- Travel Ledger
- Accounting Summary
- Budget

1130 – 1200 CHANGE MANAGEMENT

1200 - 1300 LUNCH

1300 – 1330 DTA REVIEW

1330 – 1700 DTA SUMMARY PRACTICAL EXERCISE

- Course Review & Evaluations